

2016 Wendia North America Customer-Partner Conference



September 12-14, 2016 • Park City, Utah

Helpdesk Management Reporting

- POB G6 reporting capabilities
- POB G6 alternate data views
- How to access reports and overviews
- Helpdesk management report ideas
- Report design for ease of creation

POB G6 Reporting Capabilities

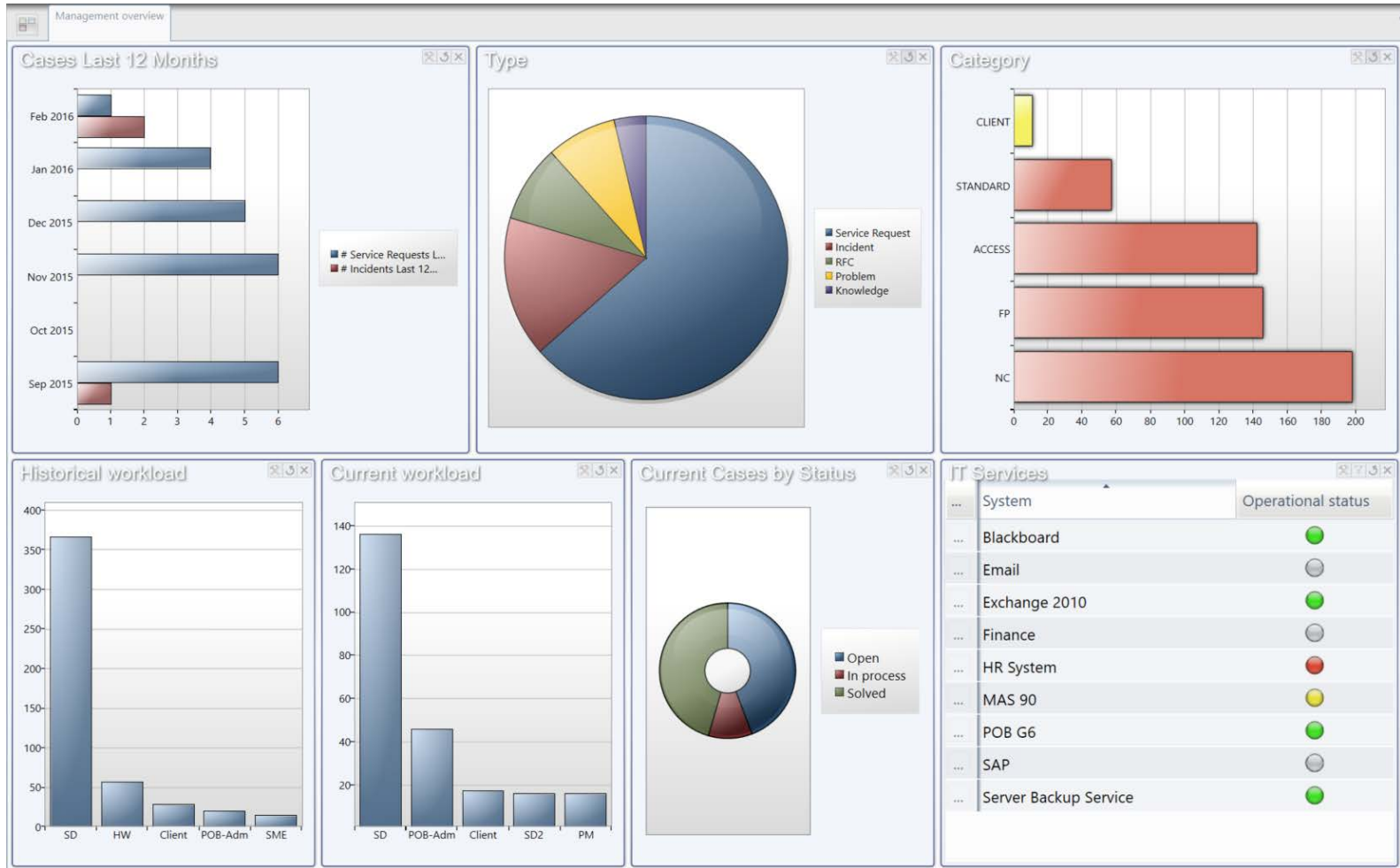
- Microsoft Reporting Services
 - Built in ad-hoc reporting
 - Good for quick queries
- Crystal Reports
 - Requires additional software at a cost to create reports but the crystal runtime is freely available to run reports from POB
 - Able to provide more complex data and graphs

POB G6 Reporting Capabilities (cont.)

- SQL Server Reporting Services
 - Requires additional free software to create reports and runs natively out of the POB client
 - Provides similar output as to what Crystal can offer.
- Alternate Applications
 - Other reporting or dashboard applications that can create a database connection to MS SQL will work fine, like iDashboards.

POB G6 Alternate Data Views

- POB Overviews
 - Graphical representations or lists of the data within POB grouped into customizable screens

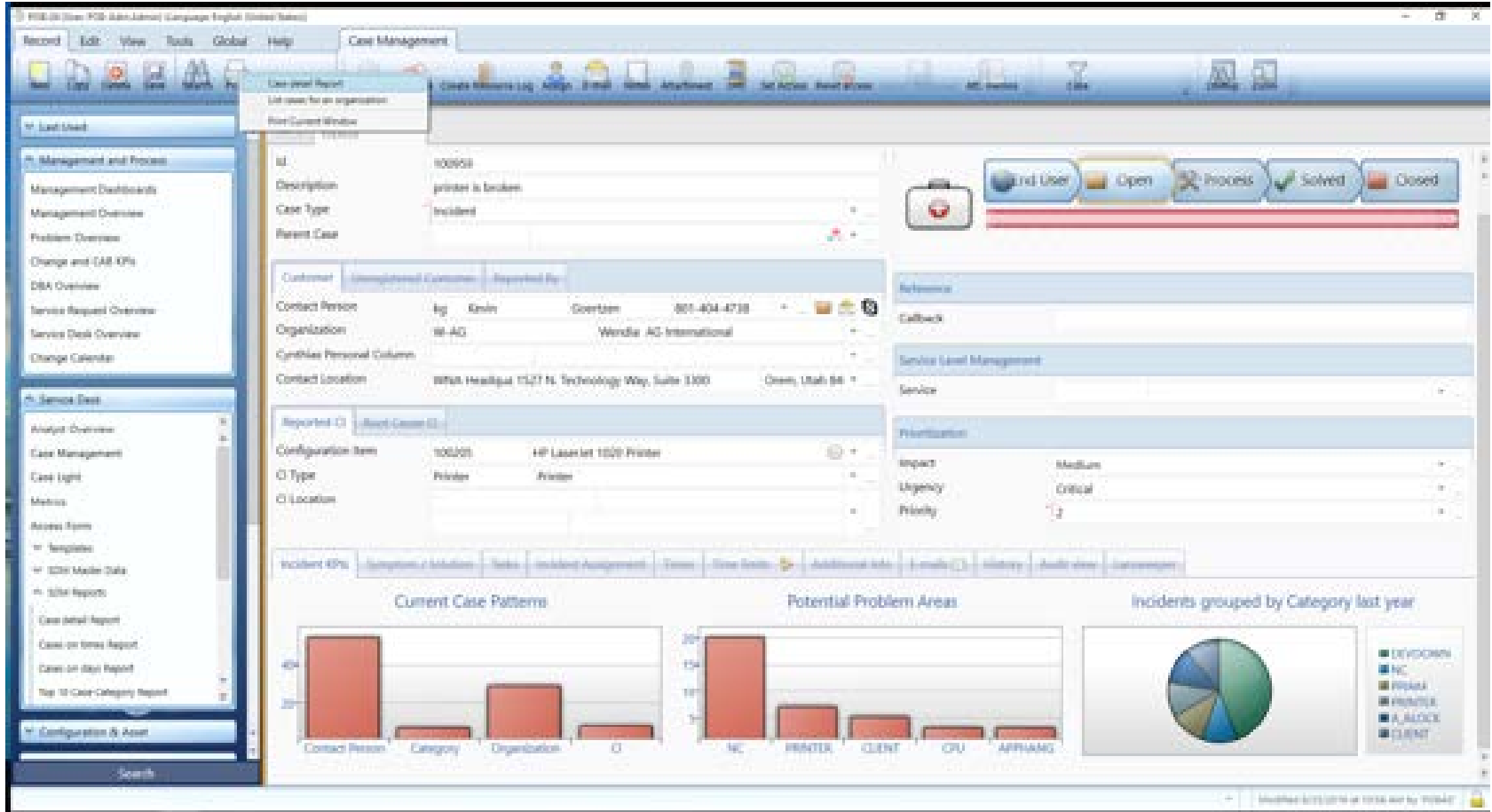


POB G6 Alternate Data Views (cont.)

- iDashboards
 - Similar to an overview but allows for more complicated queries as it's built from SQL queries combined together into a view



Accessing a Report Printer Icon on Screen



The screenshot displays the Wendia Case Management interface. The main content area shows a case for a printer. A printer icon is visible in the top right corner of the case details section.

Case Details:

- ID: 100501
- Description: printer is broken
- Case Type: Incident
- Parent Case: [None]
- Customer: [Unregistered Customer]
- Contact Person: Ig, Kevin Goertzen 801-404-4718
- Organization: W-AG Wendia AG International
- Contact Location: 1527 N. Technology Way, Suite 1100, Orem, Utah 84
- Configuration Item: 100201 HP LaserJet 1020 Printer
- CI Type: Printer Printer
- CI Location: [None]

Incident Status: End User, Open, Process, Solved, Closed

Service Level Management: Service [None]

Classification: Impact: Medium, Urgency: Critical, Priority: [None]

Current Case Patterns:

Category	Count
Contact Person	40
Category	10
Organization	30
CI	10

Potential Problem Areas:

Category	Count
PC	20
PRINTER	10
CLIENT	10
CPU	10
APPRANG	10

Incidents grouped by Category last year:

Legend: DEVTOOLS, PC, PRINTER, CPU, APPRANG, CLIENT

Accessing a Report Custom Side Bar

POB.G6 (User: POB-Adm.Admin) (Language: English (United States))

Record Edit View Tools Global Help

POB Report: Top 10 Case Category Report

New Copy Delete Save Search Print

Print PDF XLS DOC Zoom Zoom Next Previous Undo

POB Report: Top 10 Case Category Report

Last Used

Management and Process

- Management Dashboards
- Management Overview
- Problem Overview
- Change and CAB KPIs
- DBA Overview
- Service Request Overview
- Service Desk Overview
- Change Calendar


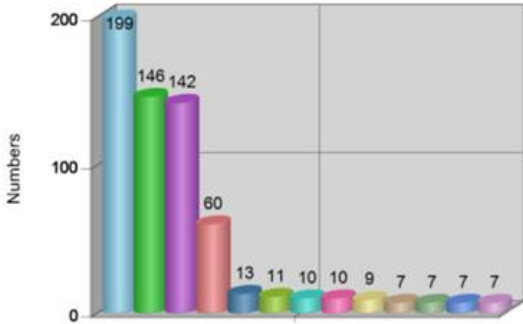
Service Desk

- SDM Master Data
- SDM Reports
 - Cases on times Report
 - Cases on days Report
 - Top 10 Case Category Report
 - Top 10 Case Type Report
 - Top 10 CI Type Report
 - Top 10 Item Report
 - Ten 10 Priority Report
 - Time limit status
 - Service Request Report
 - Service Requests by Category

Search

Top 10 Case Category Report

Selection:
And: None

Numbers

Case Category Search results list

- NC
- FP
- ACCESS
- STANDARD
- CLIENT
- GENERAL
- PRINTER
- DISPOSAL
- NE
- DEVDOWN
- EMERGENCY
- DB
- A_FIN

Case Category	Number
NC	199
FP	146
ACCESS	142
STANDARD	60
CLIENT	13
GENERAL	11
PRINTER	10
DISPOSAL	10
NE	9
DEVDOWN	7
EMERGENCY	7
DB	7
A_FIN	7

Helpdesk Management Report Ideas

- Breakdown of cases triaged by the helpdesk by type and/or configuration item
 - Ability to review for expanded scope
 - Additional training on those cases that should have been first level resolution
- Review of quantity of cases created via incoming method
 - Track how many cases any given individual processes per shift/hour against FLR and returned cases to look for training needs
 - Determine potential self-service methods for customers to increase speed of service and lighten the load on the desk.

Helpdesk Management Report Ideas (cont.)

- SLA/KPI/MTTR Reporting
 - Review of how cases are handled to validate you are meeting your customer's expectations
- Cases created by time of day
 - Allows you to review new case creation by method, time of day, and day of the week to ensure proper staffing levels.

Report Design Mapping

- Fields shown on the report
- Constant restrictions to limit the data
- Runtime parameters to further limit data but open to changing by the person running the report
- Report mock up
 - Excel – Layout the fields in the order you want to see them in their respective columns
 - Word/PDF – Design the layout to the best of your ability either in Word or by hand



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